

# Greetings Manager Module of Perfex CRM

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## Description:

**Greetings Manager** allows admin or staff to send greeting SMS or Email to Client's contact or staff in Perfex CRM.

This module is not a standalone script, it is module of Perfex CRM.

Perfex CRM is already approved in Codecanyon <https://codecanyon.net/item/perfex-powerful-open-source-crm/14013737>

By using this module, Admin and staff will be able to create schedule to send automatic SMS or Email to the Clients or Staff on their special days like Birthday, Anniversary etc.

Thus, Best wishes will be sent to the Clients or Staffs from the company on their special Days.

Staff will be required to set a schedule for one time only, to send automatic greetings SMS/Email for every upcoming special day of Clients or other Staffs.

This module will use Custom fields of Contacts and Staff to send greetings. So that custom field should be Date type.

This module uses default SMS gateway activated in Perfex crm.

This module uses default Email settings activated in Perfex crm.

This module is user friendly, quick and easy to install and use.

**Note:** If you are installing first time, then Upgrade is not required. Upgrade is only required when you have already installed our module and there is a new version updates available of module.

# Steps to Upgrade:

## Step 1. Upgrade Files:

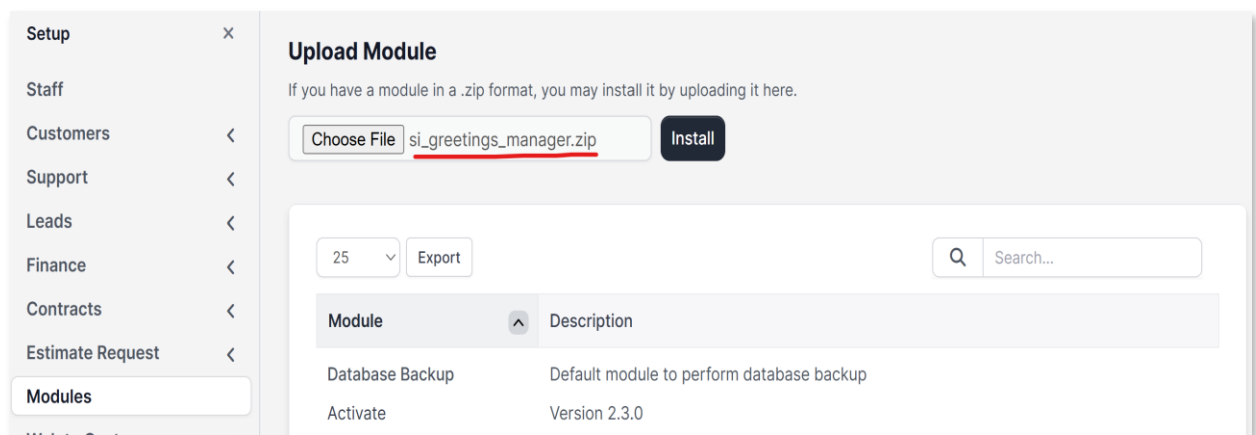
You have two options to upgrade Module files.

### Option 1:

You will get si\_greetings\_manager.zip file in **All files** Directory. You can use this zip file to Install this module in Perfex CRM. Just like you are Installing New Module.

Go to Perfex CRM Admin Menu -> SETUP -> Modules.

Upload Module zip file and click Install button.



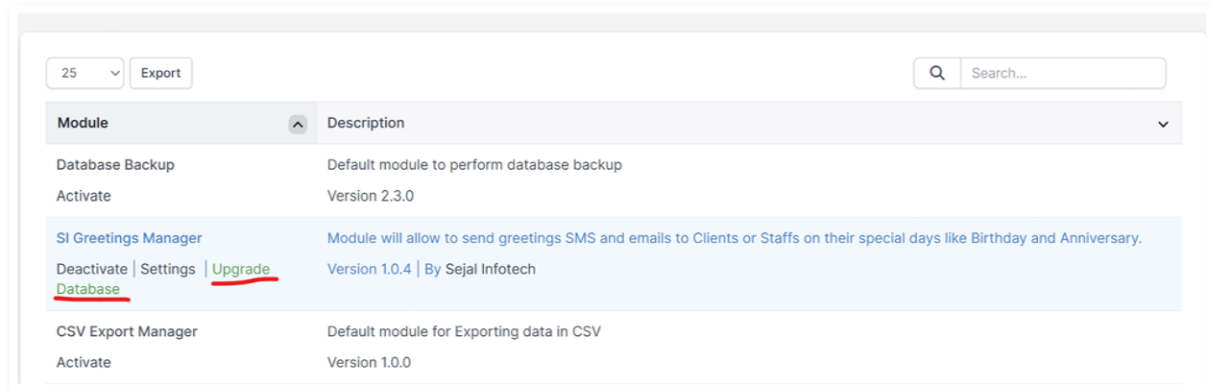
You will be able to see '**SI Greetings Manager**' Module in list of Modules and Upgrade Database link. So Files are upgraded.

### Option 2:

If you do not want to Install that zip file again in Upgrade, then you can unzip that file in **PERFEX\_CRM\_PATH/modules/** directory where **si\_greetings\_manager** directory is there. You can replace this directory by unzip folder.

## **Step 2. Upgrade Database:**

After Upgrading files, you will see "Upgrade Database" link in SETUP -> Modules -> SI Greetings Manager.



Click on that Link and Database will be Upgraded.

**Note :** If you find any difficulty in the functionality, kindly Refresh the Browser window by **SHIFT + F5** or try to check in **Private Browser** to avoid cache issue.

That's it....